



PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

PCORI Online User Manual: Submitting an Application

Addressing Disparities

Assessment of Prevention, Diagnosis, and Treatment Options

Communication and Dissemination Research

Improving Healthcare Systems

Fall 2014 Cycle



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About the PCORI Online System

The PCORI Online System (pcori.fluxx.io) supports PCORI Funding Announcements (PFAs), application submission, and PCORI's review process. Before you begin, please note the following:

- To apply for PCORI funding you must have an account in the system. If you do not have one, create one using the instructions below. If you have applied to PCORI in the past, your account has been retained. You do not need to create a new account, but you will need to request a new password. Just click "Reset or create password" to receive your new password or enter your username and password in the sign-in boxes.
- The PCORI Online System is compatible only with [Safari](#) and [Google Chrome](#) browsers.
- To complete all sections of your application, use the left-side tabs or the "Previous" and "Next" buttons at the bottom of the window.
 - To save your work, click the "Save and Review" tab and then the "Save and Review" button. **Be sure to save your work before closing the browser window or your work will be lost.**
- If you run into technical difficulties using the PCORI Online System, please contact us at pfa@pcori.org.



Log Into PCORI Online

Use the PCORI Online System to submit your application. **To complete your application, you must have previously submitted a Letter of Intent (LOI) to PCORI.** (Note that all LOIs must be approved by PCORI prior to the submission of an application. Refer to the PFA for further guidance.)

- To login, go to pcori.fluxx.io
- Enter the username and password you used to submit your LOI
- If you forgot your password, click the “Reset or create password” link

Welcome to PCORI Online

Login Now:

Username

Password

Sign in

[Reset or create password](#)

Forgot your password? Click this button to retrieve it.

Technical Note: Please use [Chrome](#) or [Safari](#) browsers.

If you are a new user, please register by clicking on the "Create an Account Now" button.

If you are a reviewer or have applied to PCORI in the past, you do not need to create a new user account. Please click the "Reset or create password" link to the left to receive your new password.

Current Announcements

[Funding Opportunities – Spring 2014 Cycle](#)

The PCORI Online system is now open for submission of an LOI. To view all available opportunities, please visit our [Funding Center](#).

Application Resources

View PCORI's [Funding Center](#) for application guidelines and templates, key dates, PCORI Funding Announcements (PFAs) and additional information.

The PCORI Online User Manual now contains step-by-step instructions on how to submit your [LOI](#).

For any administrative or technical questions while submitting your LOI, please email us at pfa@pcori.org or call us at 202-627-1885.

[Create an account now](#)

Locate Your Application

To begin your application, click the yellow pencil icon next to the request number. The application includes previous contact and project information from the LOI and requires additional information.

Amount Requested	Date Created	Program	Status
FC14-1407-10005 	7/18/2014	Assessment of Prevention, Diagnosis, and Treatment Options	Application: In Progress Withdraw



Click the yellow pencil icon to begin your application.

Create the Application

Use the left-side navigational links and the “Previous” and “Next” buttons at the bottom of the pages to guide you through the application creation and submission process.

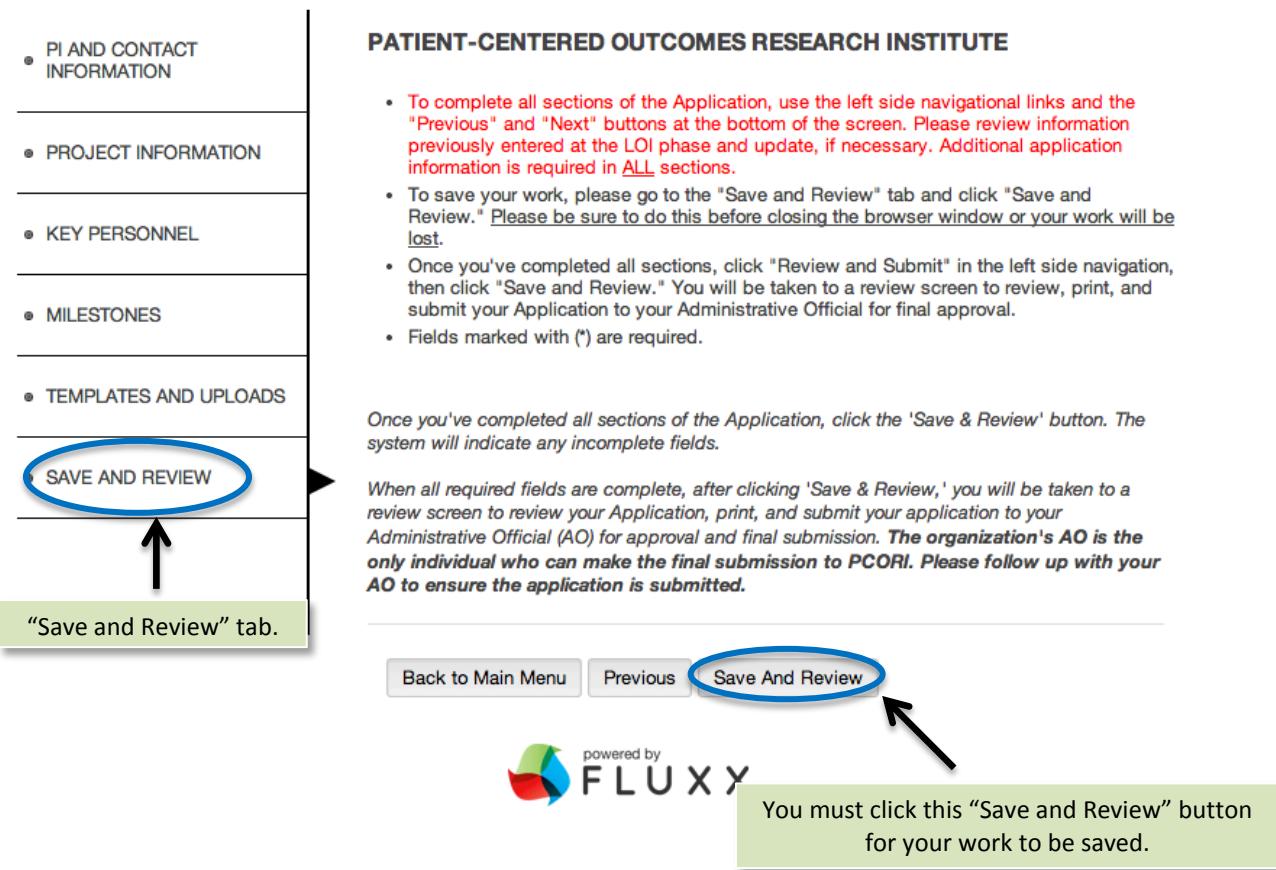
- PI AND CONTACT INFORMATION
- PROJECT INFORMATION
- KEY PERSONNEL
- MILESTONES
- TEMPLATES AND UPLOADS
- SAVE AND REVIEW

PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

- To complete all sections of the Application, use the left side navigational links and the “Previous” and “Next” buttons at the bottom of the screen. Please review information previously entered at the LOI phase and update, if necessary. Additional application information is required in **ALL** sections.
- To save your work, please go to the “Save and Review” tab and click “Save and Review.” Please be sure to do this before closing the browser window or your work will be lost.
- Once you’ve completed all sections, click “Review and Submit” in the left side navigation, then click “Save and Review.” You will be taken to a review screen to review, print, and submit your Application to your Administrative Official for final approval.
- Fields marked with (*) are required.
- Begin typing the Organization’s name in the field below. If the Organization does not appear in the auto-populated list, you must click “Add New” to create a new entry. A pop-up box will appear for you to enter this information; all fields in bold are required. If the organization does not have a DUNS number, click [here](#).
- You must designate an Administrative Official (AO) with a valid email address in order to submit your application to PCORI.
- If the Principal Investigator or Administrative Official does not appear in the drop down menu, click “Add New” to create a new entry. A popup will appear for entry; fields in bold are required.
 - The AO and the PI cannot be the same individual.
 - To find your Congressional District please click [here](#).

Saving Your Application

While working on your application you are free to save your work at any time. To save your work, go to the "Save and Review" tab and click the "Save and Review" button. **Please be sure to do this before closing the browser window or your work will be lost.** After saving your work, you may click on the "Back to Main Menu" button to leave the current application session.



The screenshot shows the left navigation bar of the PCORI application. The sections listed are: PI AND CONTACT INFORMATION, PROJECT INFORMATION, KEY PERSONNEL, MILESTONES, TEMPLATES AND UPLOADS, and SAVE AND REVIEW. The 'SAVE AND REVIEW' section is highlighted with a blue oval and an upward-pointing arrow. A green box labeled "Save and Review" tab is positioned below the navigation bar. To the right, the main content area is titled "PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE". It contains instructions for completing the application, saving work, and submitting. Below these instructions, a note says: "Once you've completed all sections of the Application, click the 'Save & Review' button. The system will indicate any incomplete fields." Another note below states: "When all required fields are complete, after clicking 'Save & Review,' you will be taken to a review screen to review your Application, print, and submit your application to your Administrative Official (AO) for approval and final submission. **The organization's AO is the only individual who can make the final submission to PCORI. Please follow up with your AO to ensure the application is submitted.**" At the bottom, there are three buttons: Back to Main Menu, Previous, and Save And Review. The 'Save And Review' button is circled in blue and has an arrow pointing to it from the note below. The note is contained within a green box that reads: "You must click this 'Save and Review' button for your work to be saved."

PI AND CONTACT INFORMATION

PROJECT INFORMATION

KEY PERSONNEL

MILESTONES

TEMPLATES AND UPLOADS

SAVE AND REVIEW

PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

- To complete all sections of the Application, use the left side navigational links and the "Previous" and "Next" buttons at the bottom of the screen. Please review information previously entered at the LOI phase and update, if necessary. Additional application information is required in ALL sections.
- To save your work, please go to the "Save and Review" tab and click "Save and Review." Please be sure to do this before closing the browser window or your work will be lost.
- Once you've completed all sections, click "Review and Submit" in the left side navigation, then click "Save and Review." You will be taken to a review screen to review, print, and submit your Application to your Administrative Official for final approval.
- Fields marked with (*) are required.

Once you've completed all sections of the Application, click the 'Save & Review' button. The system will indicate any incomplete fields.

When all required fields are complete, after clicking 'Save & Review,' you will be taken to a review screen to review your Application, print, and submit your application to your Administrative Official (AO) for approval and final submission. **The organization's AO is the only individual who can make the final submission to PCORI. Please follow up with your AO to ensure the application is submitted.**

Back to Main Menu Previous Save And Review

powered by  FLUXY

You must click this "Save and Review" button for your work to be saved.

To return to a saved draft application, click on the yellow pencil icon on the landing page.

Amount Requested	Date Created	Program	Status
FC14-1407-19890 	7/18/2014	Assessment of Prevention, Diagnosis, and Treatment Options	Application: In Progress Withdraw

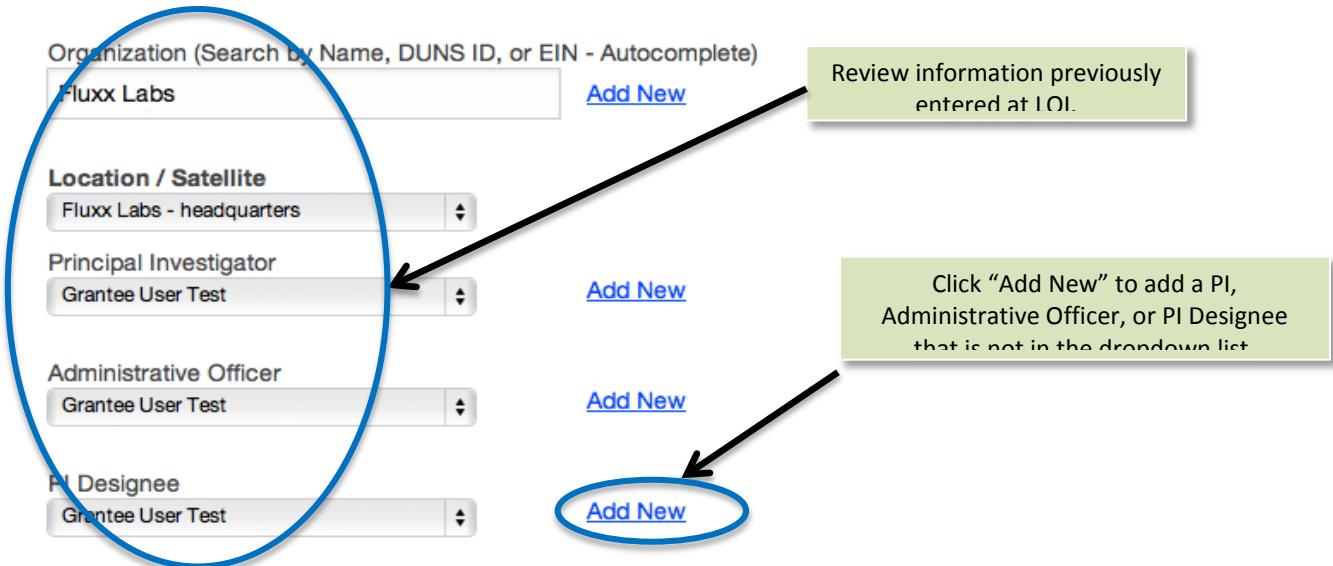
Click on the yellow pencil icon to return to your application.

Status of the application is “In Progress” until all required fields are completed and the application is submitted to the Administrative Officer.

PI and Contact Information

Please review the information that was entered with the submission of your LOI. You may edit the information, if needed.

Note that Organization, PI, and Administrative Officer information are required for application submission. The PI and the Administrative Officer cannot be the same person.



Organization (Search by Name, DUNS ID, or EIN - Autocomplete)
Fluxx Labs [Add New](#) Review information previously entered at LOI.

Location / Satellite
Fluxx Labs - headquarters [Add New](#)

Principal Investigator
Grantee User Test [Add New](#) Click “Add New” to add a PI, Administrative Officer, or PI Designee that is not in the dropdown list.

Administrative Officer
Grantee User Test [Add New](#)

PI Designee
Grantee User Test [Add New](#)



Organization Information

Organization Information

***Street Address 1**

1828 L St NW

Street Address 2

***City**

Washington

***State**

District of Columbia

***Country**

United States of America

***Zip Code**

20036

***Congressional District**

1

Scroll up for directions on how to find your Congressional District

***To which of the PCORI national research priorities or targeted funding announcements are you applying?**

Pragmatic Clinical Studies and Large Simple

***For the purpose of this project, with which group does the PI or project lead identify primarily?**

Patient/Consumer

***Have you interacted with PCORI in the past in the following ways? (Select all that apply)**

Visited PCORI website
Participated in applicant training
Watched a PCORI webinar
Attended a PCORI sponsored event in-person
Attended an event where PCORI was featured
Met with PCORI staff
Applied to be a reviewer of PCORI research
Served as a PCORI merit reviewer

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Joined a PCORI email list

Review Additional PI Information

Review the Principal Investigator information entered with the LOI. You may edit the information, if needed. Use the “Next” button at the bottom of the page to continue to the next section.

Principal Investigator Information

Please respond to questions regarding the Principal Investigator's research experience and prior funding. All fields are required.

***Position Title**

PI

***Degree**

AAS
AB
BA
BC
BCH
BCHIR
BM
BMRC

>

<

APRN

***How many years of research experience does the PI or project lead have after attaining his or her terminal degree?**

10+ Years

***How many years of research experience does the PI or project lead have related to this field of research?**

3

***Approximately how many grants/contracts have you had funded as the PI or project lead?**

6 - 10

***Total dollar amount (direct costs) for largest grant/contract for which you were the PI:**

\$1.1 to 5 million

***Have you received grants/contracts from: (Choose all that apply)**

PCORI
AHRQ
CDC
RWJF
Other (please specify)
None of the above

>

<

NIH

Project Information

Enter additional project information.

Enter the projected start and end date of the project by clicking on the calendar icon.

Enter additional project information questions. Refer to the PFA and the Application Guidelines, found in the [PCORI Funding Center](#), for additional guidance.

All fields are required.

• PI AND CONTACT INFORMATION

• PROJECT INFORMATION

• KEY PERSONNEL

• MILESTONES

• TEMPLATES AND UPLOADS

• SAVE AND REVIEW

PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

- To complete all sections of the Application, use the left side navigational links and the "Previous" and "Next" buttons at the bottom of the screen. Please review information previously entered at the LOI phase and update, if necessary. Additional application information is required in ALL sections.
- To save your work, please go to the "Save and Review" tab and click "Save and Review." Please be sure to do this before closing the browser window or your work will be lost.
- Once you've completed all sections, click "Review and Submit" in the left side navigation, then click "Save and Review." You will be taken to a review screen to review, print, and submit your Application to your Administrative Official for final approval.
- Fields marked with (*) are required.

Complete the questions below pertaining to your proposal. Please refer to your PFA for specific guidelines on the Budget and Project Period. If your PFA requires additional documentation for projects greater than the maximum project period and/or budget then please upload the required form in the "Templates and Uploads" section. A template is available [here](#).

Please enter numeric values only in the fields related to costs.

*PI Work Telephone

*Project Title

*Is this a resubmission?

*Total direct costs (Prime and Subcontracts)

*Total indirect costs (Prime and Subcontracts)

*Total amount requested

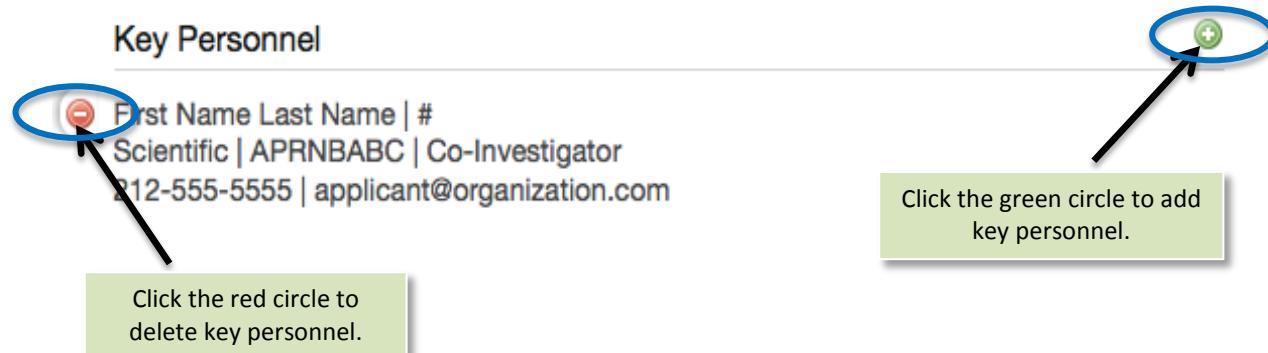
*Are you requesting a budget greater than what is outlined in the PFA?

*Please select your estimated project length

Key Personnel

- To add key personnel: click the green plus sign, enter key personnel information, and click “Create Key Personnel.”
- To remove key personnel: click the red minus sign that will appear when you hover your cursor over a name.
- **Note: After you click “Create Key Personnel” you cannot go back to edit any information. If there is an error, you must remove the entry and create a new one.**

Key Personnel



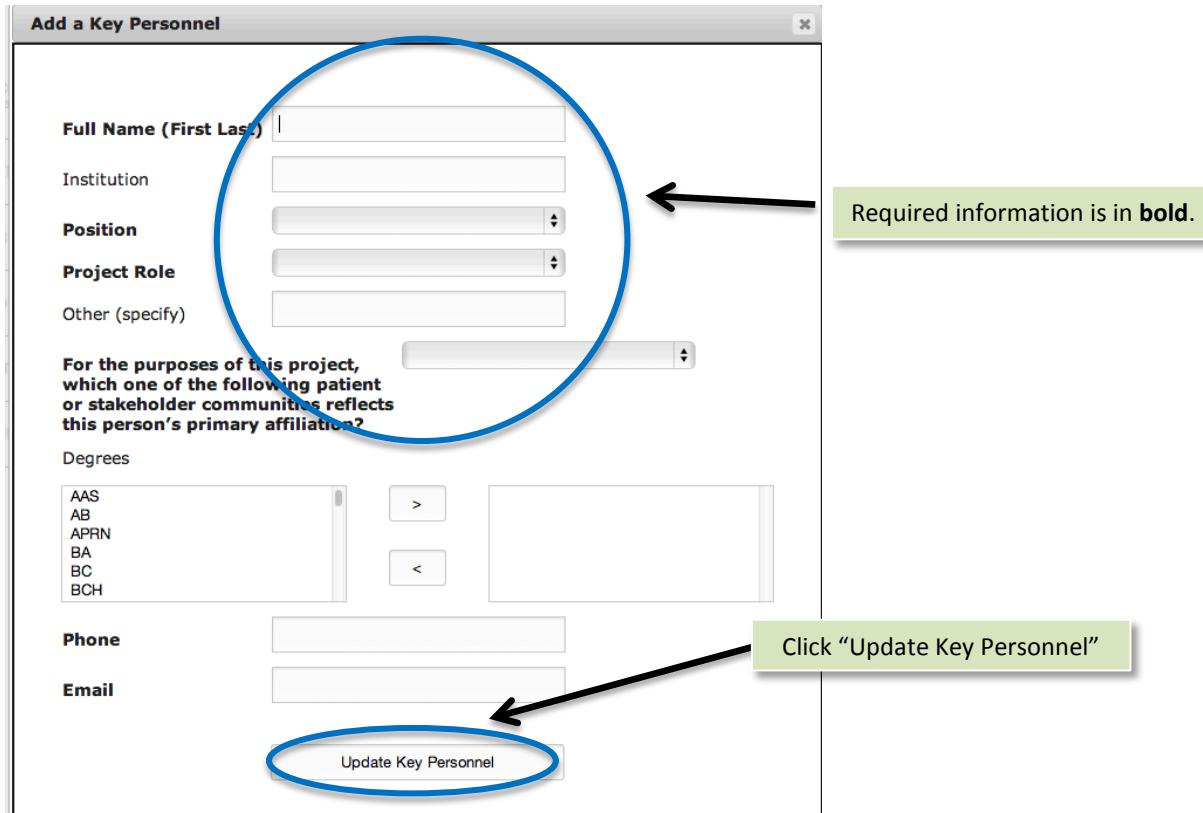
The screenshot shows a list of key personnel with the following details:

- First Name Last Name | #
- Scientific | APRNBABC | Co-Investigator
- 212-555-5555 | applicant@organization.com

Annotations on the page:

- A red minus sign icon is circled in blue, with a callout box below it stating: "Click the red circle to delete key personnel."
- A green plus sign icon is circled in blue, with a callout box to its right stating: "Click the green circle to add key personnel."

Add a Key Personnel



The dialog box contains the following fields:

- Full Name (First Last)**: A required field.
- Institution
- Position**: A required field.
- Project Role**: A required field.
- Other (specify)
- For the purposes of this project, which one of the following patient or stakeholder communities reflects this person's primary affiliation?
- Degrees: A dropdown menu containing AAS, AB, APRN, BA, BC, and BCH. A blue circle highlights this entire section.
- Phone
- Email
- Update Key Personnel**: A button at the bottom of the form.

Annotations on the dialog box:

- A callout box points to the "Required information is in **bold**." area.
- An arrow points from the "Email" field to a callout box stating: "Click ‘Update Key Personnel’".
- The "Update Key Personnel" button is circled in blue.

- Please confirm that you have added all Key Personnel by clicking the checkbox. You may be asked to complete additional key personnel question(s).

After finishing these steps, click “Next” to continue to the next section of the application.

*Please confirm that you have added all your Key Personnel.

Key Personnel 

Name your primary patient partner(s) on this project

Name your primary stakeholder partner(s) on this project

*Will the patient or stakeholder partners engaged in the study receive financial compensation for their role in this project?
 

Milestones

Enter project milestones by clicking on the green circle (plus sign). A popup window will appear. Generally, milestones measure concrete, specific outcomes such as deliverables. Enter milestone information, including: milestone name, description, and projected completion date. You may delete milestones by clicking on the red circle (minus sign), which will appear as you hover your cursor over the entry. **You cannot edit your entry; you must delete and start over.**

- PI AND CONTACT INFORMATION
- PROJECT INFORMATION
- KEY PERSONNEL
- MILESTONES
- TEMPLATES AND UPLOADS
- SAVE AND REVIEW

PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

- To complete all sections of the Application, use the left side navigational links and the "Previous" and "Next" buttons at the bottom of the screen. Please review information previously entered at the LOI phase and update, if necessary. Additional application information is required in ALL sections.
- To save your work, please go to the "Save and Review" tab and click "Save and Review." Please be sure to do this before closing the browser window or your work will be lost.
- Once you've completed all sections, click "Review and Submit" in the left side navigation, then click "Save and Review." You will be taken to a review screen to review, print, and submit your Application to your Administrative Official for final approval.
- Fields marked with (*) are required.

Generally, milestones measure concrete, specific outcomes such as deliverables. Milestones should only include activities that are supported by the PCORI contract in question. Base the milestone projected completion dates on your project's projected start date, as entered in the Project Information portion of your Application entry.

Insert your key project-specific milestones by clicking the green plus sign. All fields are required. In addition:

- At least one milestone entry per year is required
- You may delete entries by clicking on the red delete symbol that will appear as you hover your cursor over the entry
- You cannot edit your entry; you must delete and start over

*Please confirm that you have added all your Milestones.

Milestones

+

[Back to Main Menu](#) [Previous](#) [Next](#)



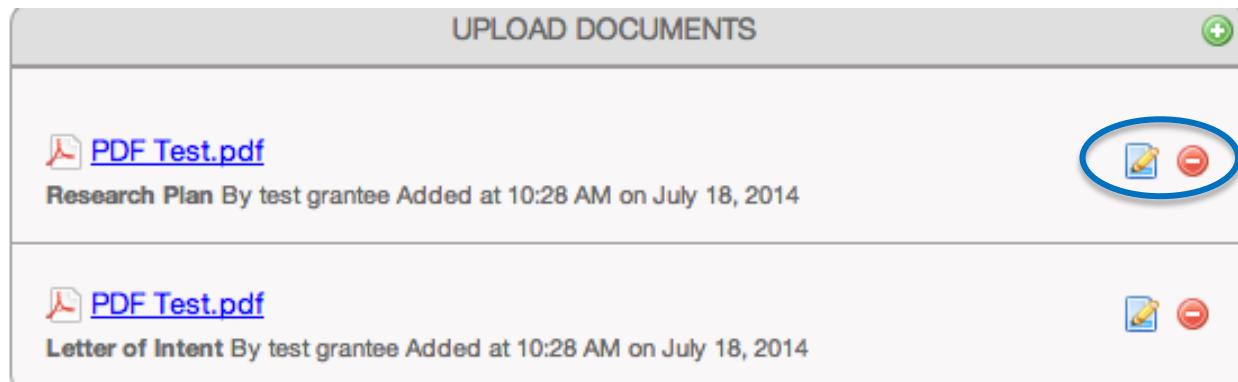
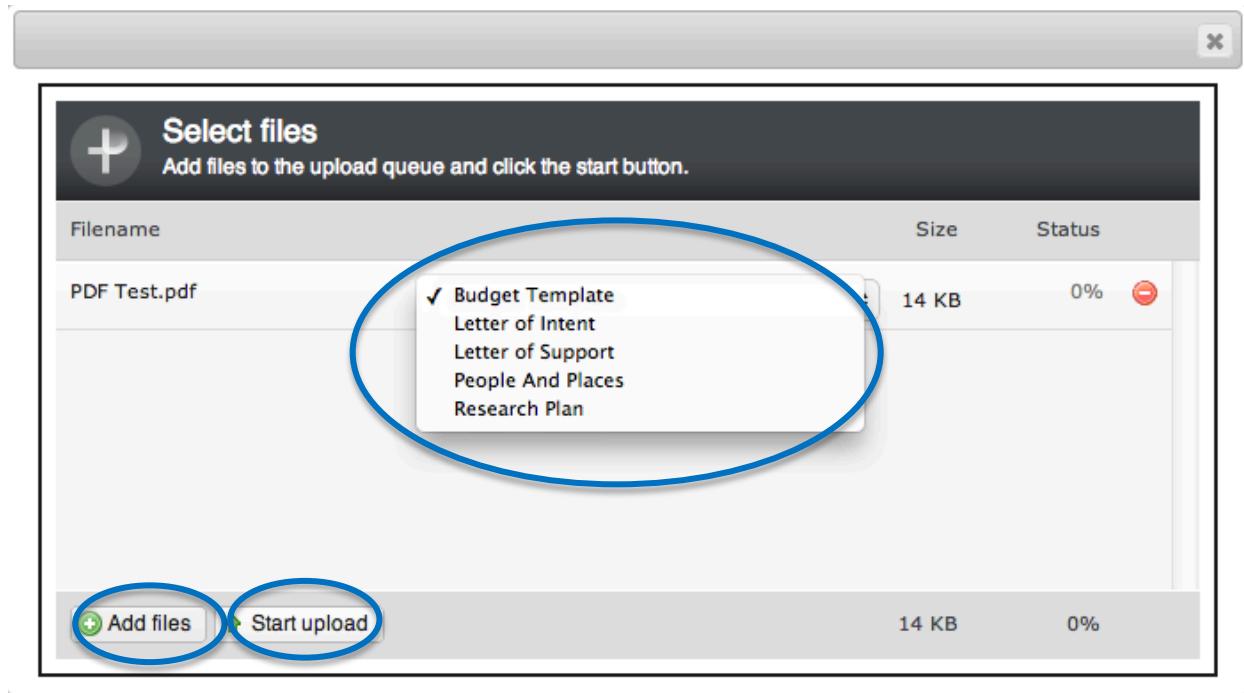
Add a Milestone

Year <input type="text"/> Milestone Name <input type="text"/> Description <div style="border: 1px solid #ccc; height: 150px; width: 100%;"></div>	<div style="background-color: #c8e6c9; border: 1px solid #739b51; padding: 5px; border-radius: 5px;"> Enter milestone information. All fields are required. </div> <div style="background-color: #c8e6c9; border: 1px solid #739b51; padding: 5px; border-radius: 5px; margin-top: 10px;"> Click "Update Milestones" after entering your information. </div>
Projected Completion Date (MM/DD/YYYY) <input type="text"/>  <div style="border: 2px solid #0070C0; border-radius: 10px; padding: 5px; text-align: center; margin-top: 5px;"> Update Milestones </div>	

Templates and Uploads

All PFAs require additional documents to complete the application. For specific instructions, refer to the PCORI Application Guidelines found in the [PCORI Funding Center](#) for the relevant PFA type. **Note: all uploads must be PDFs.**

- To upload a document, click the green plus sign.
- Click “Add files” and choose the file from your computer.
- Select the name of the required document that you are uploading from the dropdown list. If you select the wrong component and continue with the upload, you can make a correction by clicking the pen and paper icon after the upload is completed. See the second screenshot below.
- Click “Start upload.”
- To delete an uploaded file, click the red minus sign.

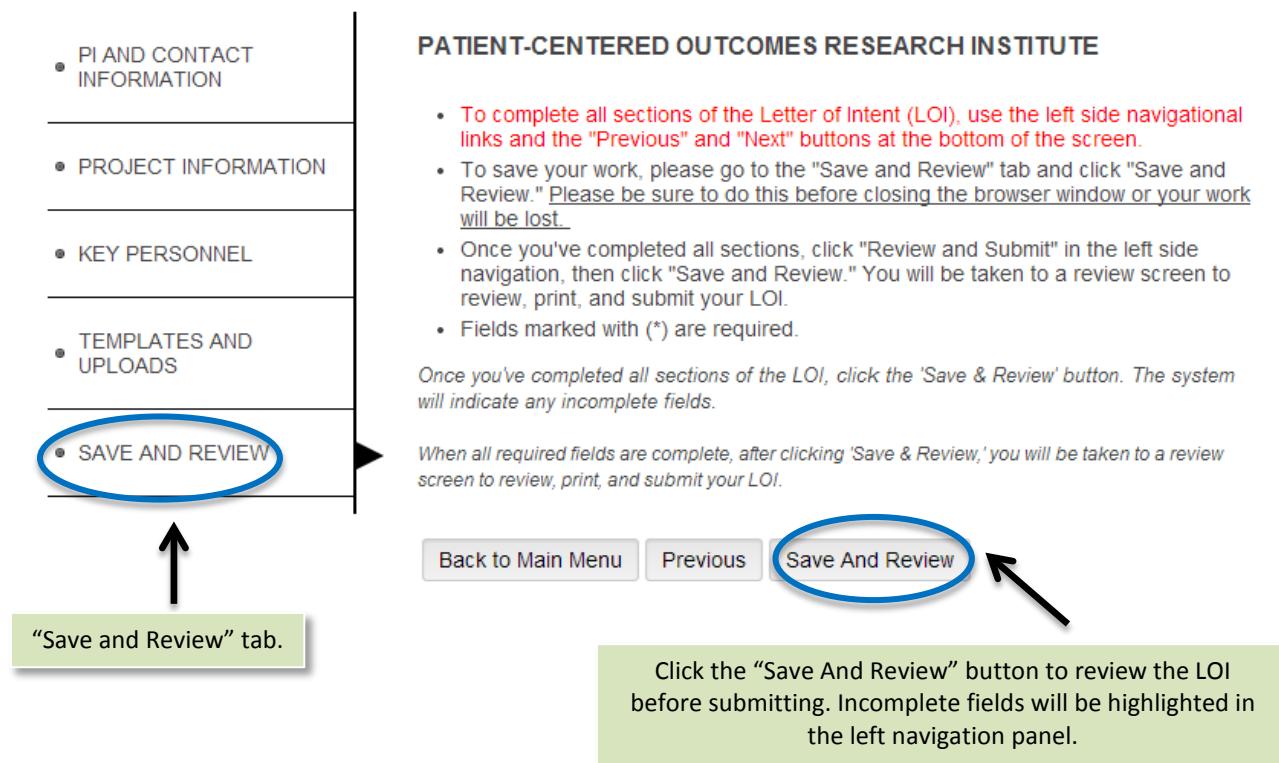


The screenshot shows the "UPLOAD DOCUMENTS" page. It displays two uploaded documents: "PDF Test.pdf" (Research Plan) and "PDF Test.pdf" (Letter of Intent). Each document entry includes a preview icon, the file name, the author ("By test grantee"), the date added ("Added at 10:28 AM on July 18, 2014"), and edit/delete icons. The edit icon is circled in blue.

Save and Review

- Once you've completed all sections, go to the "Save and Review" tab and click the "Save and Review" button. Any incomplete sections will be highlighted in the left navigation panel, with incomplete fields marked in each section.
- If all required fields are complete, you will see a summary screen. From this screen, you can review, print, or save your application as a PDF.

Fall 2014 Cycle



The screenshot shows the left navigation panel and the main content area of the PCORI application.

Left Navigation Panel:

- PI AND CONTACT INFORMATION
- PROJECT INFORMATION
- KEY PERSONNEL
- TEMPLATES AND UPLOADS
- SAVE AND REVIEW** (This item is circled in blue)

Main Content Area:

PATIENT-CENTERED OUTCOMES RESEARCH INSTITUTE

- To complete all sections of the Letter of Intent (LOI), use the left side navigational links and the "Previous" and "Next" buttons at the bottom of the screen.
- To save your work, please go to the "Save and Review" tab and click "Save and Review." Please be sure to do this before closing the browser window or your work will be lost.
- Once you've completed all sections, click "Review and Submit" in the left side navigation, then click "Save and Review." You will be taken to a review screen to review, print, and submit your LOI.
- Fields marked with (*) are required.

Once you've completed all sections of the LOI, click the 'Save & Review' button. The system will indicate any incomplete fields.

When all required fields are complete, after clicking 'Save & Review,' you will be taken to a review screen to review, print, and submit your LOI.

Buttons at the bottom: Back to Main Menu, Previous, Save And Review (This button is circled in blue and has a black arrow pointing to it from the bottom right).

Callout Box:

Click the "Save And Review" button to review the LOI before submitting. Incomplete fields will be highlighted in the left navigation panel.



Submit to Administrative Official

Review the summary of your application. Click “Edit Request” if changes are necessary. Once complete, click the “Submit to AO” button to submit your application to the Administrative Official designated on the “PI and Project Information” tab.

Note that only the AO may submit the application to PCORI. Please contact your AO to ensure that your application was reviewed and submitted.

R-1306-03160

Edit Request PDF Print Back to Main Menu **Submit to AO** Withdraw

Fluxx Labs
Request for \$700,000.00

APPLICANT - Grantee User Test

PI AND CONTACT INFORMATION

Principal Investigator - Grantee User Test
Administrative Official - Grantee User Test
Financial Official -
PI Designee / Assistant -

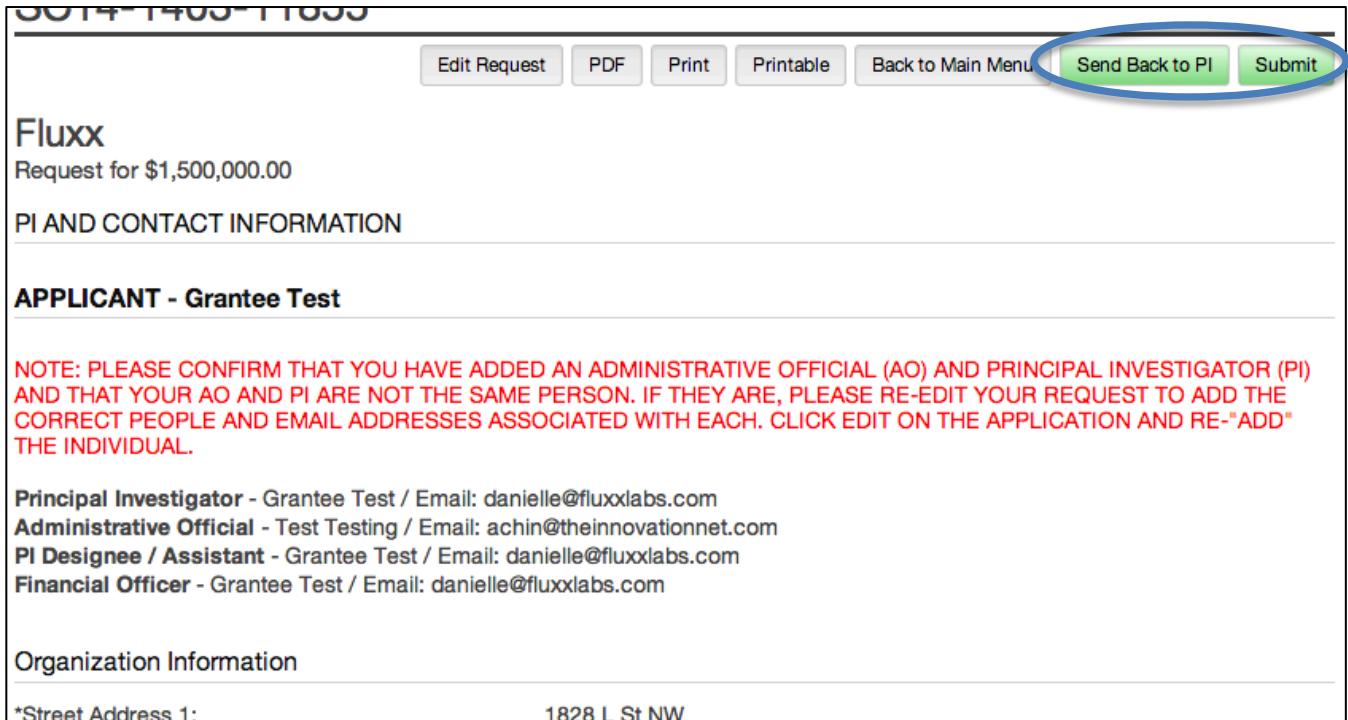
Principal Investigator Information
Please respond to questions regarding the Principal Investigator's research experience and prior funding. All fields are required.
Position Title: Position Title

Please review your Application fully. You WILL NOT be able to make changes after you click "Submit to AO." It is your responsibility to ensure that your AO submits the application to PCORI before the deadline.

Once you have completed and reviewed all sections, click “Submit to AO” to submit your application to your Administrative Official.

If changes to the application are required, the AO may release the application back to the Principal Investigator (PI). In order to do so, the AO must click the “Send Back to PI” button. The AO will need to notify the PI that an action is required on their part.

Once the AO has reviewed the application, they **must** click “Submit” in order to submit the application to PCORI.



The screenshot shows a web-based application submission interface. At the top, there is a navigation bar with buttons for "Edit Request", "PDF", "Print", "Printable", "Back to Main Menu", "Send Back to PI" (which is highlighted with a blue oval), and "Submit". Below the navigation bar, the application details are listed: "Fluxx" and "Request for \$1,500,000.00". A section titled "PI AND CONTACT INFORMATION" follows. Under "APPLICANT - Grantee Test", there is a note in red text: "NOTE: PLEASE CONFIRM THAT YOU HAVE ADDED AN ADMINISTRATIVE OFFICIAL (AO) AND PRINCIPAL INVESTIGATOR (PI) AND THAT YOUR AO AND PI ARE NOT THE SAME PERSON. IF THEY ARE, PLEASE RE-EDIT YOUR REQUEST TO ADD THE CORRECT PEOPLE AND EMAIL ADDRESSES ASSOCIATED WITH EACH. CLICK EDIT ON THE APPLICATION AND RE-“ADD” THE INDIVIDUAL." Below this note, contact information is listed: "Principal Investigator - Grantee Test / Email: danielle@fluxlabs.com", "Administrative Official - Test Testing / Email: achin@theinnovationnet.com", "PI Designee / Assistant - Grantee Test / Email: danielle@fluxlabs.com", and "Financial Officer - Grantee Test / Email: danielle@fluxlabs.com". The "Organization Information" section includes a field for "Street Address 1" with the value "1828 I St NW".

Resources and Contact Information

- All active opportunities can be found in the [PCORI Funding Center](#).
- To find application templates and any additional instruction for a specific opportunity, select the opportunity of interest in the Funding Center and review the applicant resources section of the page.
- PCORI's [Applicant FAQs](#) cover common questions that an applicant may have about PCORI and the application process. These are updated on a regular basis to reflect questions received through our helpdesk and applicant town halls.
- Applicant training materials and information about PCORI's applicant town hall sessions will be posted on PCORI's [Applicant Training](#) page. Once available, applicants will receive an email about these opportunities.
- If you have questions, please contact us at pfa@pcori.org.